



Export data for payroll

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By giving you, the user, the flexibility to create your own export formats we empower you to connect your own software and services without delay.

To create your own export format log in to the TIMEDOCK web portal and navigate to **Export** and select **Custom CSV**. You will see a screen like this one:

The screenshot shows the 'CSV export' configuration page in the TIMEDOCK web portal. The page has a dark teal header with navigation links: Home, Timesheet, Jobsheet-beta, Manage, Account, Help, and Log out. Below the header, there are tabs for Overview, Payroll export (selected), and Raw data. The breadcrumb trail is 'app / time-sheet / export / csv'. The main heading is 'CSV export'. Underneath, there is a section titled 'Date and rounding' with three fields: 'From:' (12/01/2014), 'To:' (18/01/2014), and 'Rounding:' (No rounding). Below this is a 'Data template' section with three radio buttons: 'default' (selected), 'Custom format', and 'From template'. A table below the radio buttons shows the default fields: In/Out, Date, Time, Authority, and Employee. An 'Export to CSV' button is located at the bottom right of the form.

Date and rounding:

These options are fairly self-explanatory. **From** is the start date of the period you wish to export. **To** is the end date of the period you wish to export. **Rounding** gives you the option to round to the nearest 5 or 15 minutes.

Data template:

There are three options here to choose from before we get started exporting:

- Default** - This is our default CSV format. If selected then the fields to export are listed in the table directly below the **Data template** options.
- Custom format** - Here you can define your own fields/columns for the export file.
- From template** - Allows you to select from a previously saved template. NB: Requires at least one custom format saved as a template.

Making a custom format:

Click Custom format to select that option. The screen will drop down with some extra options to play with.

Data template
 default
 Custom format
 From template

Export columns:
 Each In/Out
 Consolidate pairs
 Consolidate days

action x	date x	time x	authority x	employee-name x
data	data	data	data	data
data	data	data	data	data
data	data	data	data	data
data	data	data	data	data
data	data	data	data	data

Type a name here if you wish to save as a template:

Columns available:

- Unique Identifier
- Clock In / Clock Out
- Date
- Time
- DateTime
- AuthorityName

Drag and drop columns above onto the template to the left.

Export to CSV

Export columns:

On the line below the *Data template* heading and to the right of the *Export columns:* label we have three options to choose from:

- a. **Each In/Out** - This is the default-select option and will cause the export file to detail every transaction in the system. For example if Joe Bloggs clocked in at 7am then that is one line and when he clocked out at 3:30pm that is a separate line.
- b. **Paired** - Selecting this option will cause each In/Out to be condensed into a single line. This way we can get an idea of each time block that was recorded against the employee/s. Tip: If you have two *In* transactions in a row then the export will handle this by stopping the first time block just as the second begins so that the time for any employee does not overlap.
- c. **Daily** - Selecting this option will consolidate time blocks so that there is a maximum of one record per employee, per day. For example Joe Bloggs worked two different shifts on Friday however ticking this option will show only one line item with the total hours from both shifts.

Next we have *Export columns*. A preview can be seen in the image above where we have a mock spreadsheet with the columns *action*, *date*, *time*, *authority* and *employee-name*.

To add more columns:

In the list of available columns under *Columns available* click the list option representing the data column. The template will update visually so you can see the new column you added. For example if we added on to our default columns with an *Hours* column then it would now look like this:

Data template

default
 Custom format
 From template

Export columns:
 Each In/Out
 Consolidate pairs
 Consolidate days

action <input type="checkbox"/>	date <input type="checkbox"/>	time <input type="checkbox"/>	authority <input type="checkbox"/>	employee-name <input type="checkbox"/>	hours <input type="checkbox"/>
data	data	data	data	data	data
data	data	data	data	data	data
data	data	data	data	data	data
data	data	data	data	data	data
data	data	data	data	data	data

Type a name here if you wish to save as a template:

Columns available:

- EmployeeReference
- JobCode
- JobCodeName
- Hours
- ContextReference
- ContextName
- UnitsDone

Drag and drop columns above onto the template to the left.

[Export to CSV](#)

To remove columns:

To remove a column from the export template click the small [x] button at the top-right of the associated column.

Export and save as a new template:

Before the final step first enter a name for your template if you wish to save a copy for use again later. Enter it into the text box to the right of the label "*Type a name here if you wish to save as a template*".

Click *Export to CSV* as the final step to download a CSV file with the data for the time period you selected at the top of the CSV export page.